



United Way of the
Columbia-Willamette

FREE THE FUTURE

INVEST IN OUR REGION'S KIDS



ORGANIZATION & POSITION OVERVIEW: UNITED WAY OF COLUMBIA-WILLAMETTE – CFO

ORGANIZATION OVERVIEW

At United Way of the Columbia-Willamette (UWCW), we've been bringing the community together to do good for nearly 100 years. Our mission is ambitious, yet simple: we are investing in our region's kids so they are free from poverty and free to reach their potential. By bringing together people, nonprofits, businesses and government agencies in new ways, UWCW is helping to create better outcomes for kids and families. UWCW is part of United Way Worldwide, the largest privately funded nonprofit in the world operating in more than 40 countries and territories.

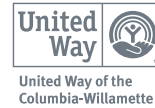
MISSION DRIVEN CULTURE

At UWCW our priority is addressing the root causes of poverty. In doing so, we put racial equity at the center of our work because research shows that families of color face social and economic disparities that deter the progress of our community as a whole. By addressing these disparities we can disrupt the cycle of poverty and create a more equitable region that benefits everyone. Diversity, inclusion and equity are fundamental values for UWCW, both internally and externally. From our interactions with the public to engagement with donors and the allocation of resources across communities - equity is at the forefront of all that we do. We are committed to working with diverse communities and individuals as partners, donors and volunteers. Our staff and Board reflect the diversity of the four-county region we serve, and together, we are authentically and intentionally dedicated to UWCW's mission through our daily work, interactions and commitments in the community.

POSITION OVERVIEW

Reporting directly to the CEO, the **Chief Financial Officer (CFO)** will be responsible for a wide range of activities related to finance, information technology, business strategy, and administration to support effective business operations. The CFO will be a financial expert, overseeing the finance and business functions of the organization, and ensuring strong fiduciary strategy, oversight, and communication. This includes serving as a member of the Senior Leadership Team, staffing the Board Finance Committee, supporting the CEO in staffing the Board, and assuming additional strategic and leadership roles to further the organization's mission.

ACCOUNTABILITIES



Financial Strategy and Leadership

- Responsible for the development, execution, and effectiveness of financial and business systems, including analytics, asset, and risk management.
- Direct the development and operation of financial systems, including budgeting, auditing, accounting, and grant compliance.
- Support Finance and Accounting staff in the timely and accurate generation of critical financial data. Assess existing systems and develop new processes and systems to improve efficiency, accuracy, and timeliness.
- Conduct frequent and regular analysis of organizational financials, cash flow, and key business indicators. Ensure clear and consistent reporting to CEO and Senior Leadership Team, including proactive identification of issues, and related recommendations for actions and adjustments.
- Develop consistent and effective reporting and modeling for the Board Finance Committee and Board of Directors.

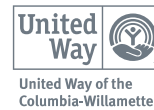
Organizational Leadership

- Participate as a member of the Senior Leadership Team to provide enterprise-level strategic leadership and serve as staff leader for the Board Finance Committee.
- Assist the CEO in working with and supporting the Board of Directors, specifically ensuring consistent and transparent financial reporting.
- Work closely with Treasurer of the Board of Directors to develop effective meeting schedules, rigorous reporting, and effective engagement.
- Serve as liaison to key external partners, including investment and retirement managers, and insurance brokers/vendors. Coordinate engagement with and decisions between United Way leadership, Board, and Board Finance Committee.
- Ensure the continuity of operations in the CEO's absence.
- Provide assistance to the CEO in staffing special committees and in the administration of functions that further the mission.
- Responsible for accurate and timely completion and/or approval of organizational documents, including but not limited to performance reviews, professional development plans, goals and objectives, timekeeping, expense and travel reimbursements, credit card reports, requisitions, and ongoing documentation of performance accomplishments and areas requiring improvement.

Enterprise Risk Management and Compliance

- Serve as primary and accountable staff lead to identify, monitor, and mitigate any/all key business risks and exposures.
- Ensure all assets (notably cash, building, investments) are adequately protected, including strong record-keeping.
- Ensure that organizational continuity plans are in place, annually updated, and provide for the continuous function of the organization in all eventualities.
- Oversee and update risk management plans, including conservative stewardship of real property and staff safety protocols.
- Ensure adequate maintenance, insurance, and risk management for building.
- Monitor and review annually insurance plans to ensure adequate coverages.
- Serves as a trustee and lead administrator for the organization's retirement plans, ensuring sound administrative and fiscal management.
- Maintain reliable legal counsel and serve as liaison to both proactively avert legal issues and respond to any/all legal incidents or needs.
- Develop and monitor signature authority matrix.
- Provide "final approval" prior to CEO execution on all contracts, grants, and formal agreements.

ACCOUNTABILITIES (cont.)



Information Technology & Building Operations

- Oversee the work of IT in the selection, installation, and maintenance of hardware, software, networking, CRM, and data management.
- Oversee staff managing daily operations of the building and enterprise and support 1st Floor Activation Plan to provide community meeting spaces.

Cross-functional Collaboration

- In collaboration with the VP of Equity, Talent and Culture:
 - Translate strategic and tactical business plans into talent, culture, and human management policy and practice
 - Execute annual salary and benefits administration in alignment with organizational budget
 - Support integration of diversity and equity practices into employment and workplace practices
 - Approve all timecards, PTO, reimbursement, and credit card activity of Chiefs, VPs, and direct reports
- In collaboration with VP of Finance:
 - And IT Director, develop annual plans for capital expenditures and implementation
 - And Building Manager, support facility management and usage plans, budgets, and maintenance
- In collaboration with the Chief Impact Officer, Director of Government / Foundation Relations, and Community Impact staff:
 - Ensure highest-standard grants management
 - Assess potential grant and funding opportunities to determine profitability, identify risk, and ensure operational capacity
- In collaboration with the Chief Development Officer (CDO) and Resource Development staff:
 - Develop and execute systems to monitor progress and effectiveness of fundraising activities, and provide real-time reporting to CDO, CEO, RD teams, and other key volunteers and stakeholders
 - Lead the work to develop ROI metrics and measurement tools for fundraising and revenue activities, and provide strong analytics to guide CDO and RD teams
 - Support strategy development to ensure revenue goals are met
- In collaboration with the IT Director:
 - Establish appropriate IT business continuity and cyber security policies and practices

Equity, Diversity, and Inclusion

- Serve as an active partner for and champion in United Way's Equity, Diversity, and Inclusion efforts, both internally and externally.

Manage and Develop Team Members

- Support Finance, IT, and Building teams in the execution of their team activities; when necessary provide direction for modification in work plans.
- Coach and manage a high-performance team to create vision and strategies to enhance relationship between UWCW and all industry sectors.
- Evaluate the Finance and IT staffing structure for efficiency and effectiveness, and provide individuals with professional and personal growth.
- Provide goal-setting, visioning, leadership, and strategic direction for teams.

KEY RELATIONSHIPS

CEO, Senior Leadership Team, Board of Directors, Board Finance Committee



REQUIREMENTS

- 10+ years of progressive senior-level financial management and strategy experience in preferably nonprofit entities with budgets of >\$5M; MBA and/or CPA highly desirable
- Minimum 5 years of supervisory skills and experience
- Ability to design and articulate a business case for new initiatives, programs, and processes in terms of their value to and impact on the business as a whole; experience navigating an organization through changing revenue environments, a plus
- Strong experience with government grants management and accounting
- Ability to think strategically with proven, strong ability to execute on plan, take initiative and be creative in thinking and solutions
- Strong aptitude for metrics and data analysis, using business intelligence to drive results
- Stellar presentation and communication skills with an ability to interact and influence all levels of employees within the organization, as well as relate with a diverse group of individuals or organizations in an effective manner
- Proactive, collaborative, and a dynamic leader who is a nimble and quantitative thinker with a record of achieving results individually and through others
- Ability to manage expectations of internal team members effectively and a strong desire and aptitude to be part of a team environment
- Commitment to excellence and to the mission of United Way

COMPENSATION

Competitive salary and comprehensive benefits package.



RECRUITING CONTACT

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About: Notogroup is an executive search and talent consulting firm headquartered in Portland, OR. Notogroup is proud to be a Certified B Corporation.

Representative Clients: A to Z Wineworks, Alliance for Biking & Walking, American Alpine Club, Best Made Company, Bicycle Transportation Alliance, Big Brothers Big Sisters, Bolt Threads, Brooks Running, Columbia Sportswear, Dr. Martens, Easton Sports, Eddie Bauer, Eileen Fisher, Go Picnic, Hanesbrands, Hydro Flask, Icebreaker, Leatherman, Mazamas, New Seasons Market, New Leaf Community Markets, Open School, Outdoor Research, Pacifica Beauty, Patagonia, prana, Salomon, SmartyPants, Smith Teamaker, Stumptown, The Honest Kitchen, Timbuk2, Wilson Sporting Goods, and Yakima Products.